

Documents SWAT* Team: A Model for Intensive Downsizing



**Selective Weeding and
Technology*

FDLP Fall Conference 2008

Situation:

A selective
depository needed
to downsize its
collection very
quickly to take
advantage of an
unexpected windfall
for construction.



Scenario

- Selective Depository Library:
 - a small depository with no documents librarian,
 - need to reduce collection by 80%
 - spent the past year discarding the As and have got a long way to go...
- Regional Library:
 - a regional without a completely cataloged collection, don't even have all the items converted from 1976-present
 - known "holes" in the collection, especially older materials
 - have 21 libraries all sending you offers lists; one small depository with a need to discard lots of material.
- How can these two libraries get together?

Today's Panel

Members of the team discuss how they

- approached the project,
- lessons learned,
- what they might do differently if a similar "opportunity" arises again.



TEAM BUILDING

- SWAT Team (*Special Weeding and Technology*)
5 librarians:
 - 3 regional
 - 2 on site
 - 1 based at home
 - 2 selective depositories
 - 1 with expertise in transitioning to an electronic depository
 - 1 was actively building collections

Preparation for the Visit

- oversee withdrawal of a significant portion of federal depository collection
 - Target withdrawal of over 75% of collection
- *The Federal Depository Library Handbook*
 - allows for withdrawal decisions based on Regional “eyeballing” the collection

Lists, lists, and more lists

- Materials for withdrawal - current
 - Due to the incompleteness of the catalog, however, this approach did not prove particularly useful.
- Significant runs of older serials and Serial Set volumes targeted for withdrawal
 - some documents were requested immediately
 - preliminary work assessing the condition of titles from the lists of older serials
- Lists of missing documents - visiting libraries
 - Missing Lists from Selectives not participating in visit

The Visit

- ~ week on-site going through the materials making decisions about disposition of the collection
- student and staff support
 - helpful with pulling the missing hearings
- Staff at home library
 - because the older materials are not cataloged, many questions could only be answered by checking
 - constant communication via cell phone during visit

Post Visit

- Ship requested materials to libraries
- 1 couriered some boxes home
- Home departments were supportive before, during, and after the project
 - Integrating the materials acquired into collections

Materials

- about 15 significant historical runs posted to national needs and offers list
 - All requested
- remaining materials authorized for discard after the collection is culled locally by local area faculty and librarians

Lessons learned: Teams

- Use a team approach
 - each member of the team brought different strengths
 - team members knew each other due to years of other collaborative efforts and meetings

Colorado Publications Interest Group
- Designate a team member to remain at home libraries
 - Communication between the onsite team and the “mothership” was crucial to the success of this endeavor.

Lessons learned: Lists

Complete inventory for post-1976 documents in visiting library and Regional collections.

- libraries would be required to check their holdings against Regional's list of missing items
- freeing time to concentrate on the rich historical, uncataloged, collections

Lessons learned: Prep

Ask for more prep work in advance

Examples include

- preparation of detailed lists of older serials and calf-bound volumes,
- preparation of missing or needs lists by selectives that are actively building their collections

Lessons learned: Tools

- Take multiple laptops.
 - useful for checking holdings of cataloged materials
 - for tracing publication history
- Take print tools
 - Cumulative Title and Subject Indexes to the Monthly Catalog, Andriot, and DuBester's Catalog of Census materials (*if not available on site*)

Criteria for future site visits:

- small collection
 - <3900 linear feet
- no documents librarian
 - untrained staff assigned to deal with collection
 - un-experienced staff assigned to manage
- Time
 - what time of year
 - reason for expediting process
 - such as opportunity to take advantage of remodeling funds

Criteria for future site visits:

Before any site visit, library must be willing to

- produce accurate lists of materials targeted for withdrawal
- search for and pull any volumes requested by
 - Regional based on a completed inventory of items published from 1976 on
 - other Selectives in the state
- prepare detailed lists of historically significant with complete holdings statements
- lists of calf-bound monographs or materials published before 1900

Benefits to Selective X:



- Expeditious withdrawal of materials
 - Under standard procedures, 10-15 years to complete the process — do not have a trained documents librarian on staff
- Repurpose space for a learning commons
 - without the site visit, library would have been unable to take advantage of an infusion of funds

Benefits continued:



- consultation on transitioning to a more electronic depository library
- training targeted at for providing reference services within the region

On Being a Virtual Depository

- We discussed subscribing to Marcive's Documents without Shelves service to provide access to online-only documents.
- Why not add records for all online items?
- Other possibilities: tracking online click-throughs.

Benefits to Regional:

- experience & knowledge base if face future downsizing requests
- replaced damaged and missing:
 - Census volumes, *Congressional Record* (and its predecessors), NASA materials, congressional hearings, materials from the Depts. Of State, Defense, War, Labor, Health and Human Services
 - most of *Proceedings of the American Historical Society* !
- mutually beneficial resolution of request from Selective X
 - pleased with outcome and transitioning into more electronic model



Benefits for Selectives:

- libraries acquired missing materials
 - including *Cumulative title index to United States public documents, 1789-1976* (16 volume set no longer in print; essential tool for identifying pre-1976 documents)
 - Department of Interior documents (primary interest in state)
 - many older, historical documents
- library acquired materials supporting curricular needs
- improved bibliographic control of material
- enhanced working relationship between Regional and Selectives

Benefits for Docs Community:

- All offers posted to N&O were taken
- Other Selectives in area improved collections
 - Filling in gaps
 - Adding new areas
 - Gaining access tools
- Selective X able to evaluate needs, repurpose collection, receive consultations and training, and stay in program

Basic questions

- 1) How fast do needs and offers lists get processed in your state?
 - Has your Regional requested items from your lists?
- 2) How does your state handle withdrawals of massive sets of materials?
 - Have you ever offered up sets for discarding?
- 3) How many of you have requested item(s) off a needs and offers list?

Presentors

- Regional
 - Peggy Jobe
 - Associate Professor and Faculty Director Government Publications Library, Gemmill Engineering Library, University of Colorado at Boulder
 - Jennie Gerke
 - Government Publications Library, University of Colorado
- Selectives
 - Christopher Brown,
 - Associate Professor, Reference Technology Integration Librarian / Government Documents Librarian, Penrose Library, University of Denver
 - McKinley Sielaff,
 - Government Documents Librarian, Tutt Library, Colorado College